



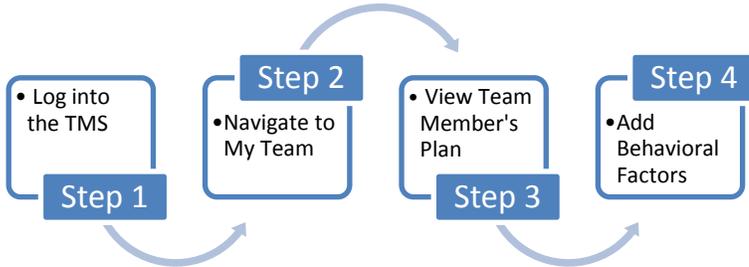
# Add Behavioral Factors to Plan

ROLE: MANAGER

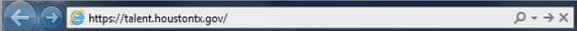
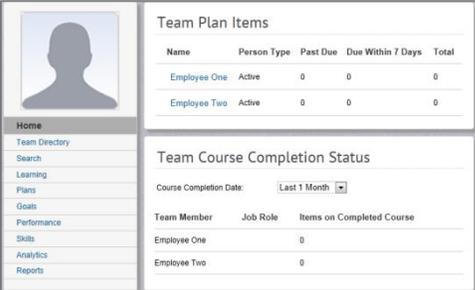
## Purpose

This job aid is to guide managers through the step-by-step process of how to add Behavioral Factors to a plan.

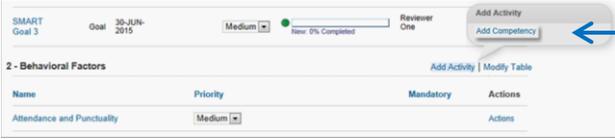
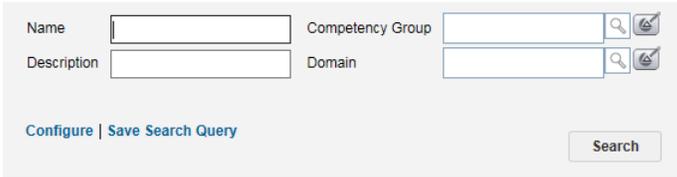
## Process Flow



## Procedure

Step	Action
<p>1. Log into the Talent Management System (TMS)</p> <div data-bbox="233 1163 534 1339" style="border: 1px solid blue; border-radius: 15px; padding: 5px; margin: 10px 0;"> <p>1. Type your <b>Username</b> and <b>Password</b> 2. Click <b>Sign In</b></p> </div>	<ul style="list-style-type: none"> <li>From any browser, type in <a href="https://talent.houstontx.gov">https://talent.houstontx.gov</a>.</li> </ul>  <ul style="list-style-type: none"> <li>The Talent Management System log in screen displays. Type in your <b>Username</b> and <b>Password</b> then click <b>Sign In</b>.</li> </ul>  <ul style="list-style-type: none"> <li>The homepage displays.</li> </ul>
<p>2. Navigate to My Team</p> <div data-bbox="331 1761 526 1837" style="border: 1px solid blue; border-radius: 15px; padding: 5px; margin: 10px 0;"> <p>Click <b>Plans</b></p> </div>	<ul style="list-style-type: none"> <li>Click the <b>My Team</b> icon in the top main header. The Team Dashboard page displays.</li> </ul>  <ul style="list-style-type: none"> <li>In the left navigation pane, click <b>Plans</b>. The Plans page displays.</li> </ul> 

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<p>3. View Team Member's Plan</p> <div data-bbox="363 390 532 516" style="border: 1px solid blue; border-radius: 10px; padding: 5px; text-align: center; margin: 10px 0;">Click the number <b>1</b> link</div> <div data-bbox="272 701 526 798" style="border: 1px solid blue; border-radius: 10px; padding: 5px; text-align: center; margin: 10px 0;">Click <b>Plan Name</b></div>	<ul style="list-style-type: none"><li>In the <b>Direct Team Plans</b>, under the <b>Draft</b> column, click on the number <b>1</b> link next to the desired employee.</li></ul> <div data-bbox="639 340 1510 592" style="border: 1px solid gray; padding: 5px;"><p>Direct Team Plans</p><table border="1"><thead><tr><th>Person Name</th><th>Person Type</th><th>Draft</th><th>Pending App...</th><th>Pending Ack...</th><th>Activated</th><th>Completed</th><th>Cancelled</th><th>Revision Requested</th><th>Actions</th></tr></thead><tbody><tr><td>Employee One</td><td>Active</td><td style="border: 2px solid red;">1</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>Actions</td></tr><tr><td>Employee Two</td><td>Active</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td></td></tr></tbody></table><p style="text-align: right;"><input type="button" value="Activate Plan"/> <input type="button" value="Create Plan"/> <input type="button" value="Add Activity"/> <input type="button" value="Reset"/></p></div> <ul style="list-style-type: none"><li>Under the <b>Plan Name</b> column, click the <b>Plan Name</b> that is in <b>Draft</b> status to view the plan details.</li></ul> <div data-bbox="639 693 1510 840" style="border: 1px solid gray; padding: 5px;"><table border="1"><thead><tr><th>Plan Name</th><th>Status</th><th>Start Date</th><th>End Date</th><th>Plan Type</th><th>Actions</th></tr></thead><tbody><tr><td>2014-15 HEAR Performance Plan</td><td style="border: 2px solid red;">Draft</td><td>07/01/2014</td><td>06/30/2015</td><td>Employee</td><td>Actions</td></tr></tbody></table><p style="text-align: right;"><input type="button" value="Add Activity to Plan"/> <input type="button" value="Activate Plan"/> <input type="button" value="Back to Team View"/> <input type="button" value="Reset"/></p></div>	Person Name	Person Type	Draft	Pending App...	Pending Ack...	Activated	Completed	Cancelled	Revision Requested	Actions	Employee One	Active	1	0	0	0	0	0	0	Actions	Employee Two	Active	0	0	0	0	0	0	0		Plan Name	Status	Start Date	End Date	Plan Type	Actions	2014-15 HEAR Performance Plan	Draft	07/01/2014	06/30/2015	Employee	Actions
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<p>4. Adding Behavioral Factors</p>	<ul style="list-style-type: none"> <li>The Plan Details page.</li> <li>In the 2-Behavioral Factors section, click <b>Add Activity</b> then <b>Add Competency</b>.</li> </ul>  <ul style="list-style-type: none"> <li>The <b>Select Competency</b> window displays.</li> <li>The list of competencies corresponding to the desired competency group displays.             <ul style="list-style-type: none"> <li>Behavioral Factors: Select Behavioral Factors from the Behavioral Factors Competency Group.</li> <li>Supervisor/Manager Factors: Select Behavioral Factors from the Supervisor/Manager Factors Competency Group</li> </ul> </li> </ul> <p><i>*HAS employees can filter by domain 2800</i></p> <p>Select Competency</p>  <p>Competencies</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Name</th> <th>Domain</th> <th>Competency Group</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Adaptability</td> <td></td> <td>Behavioral Factors</td> <td>Adaptability - refers to the employee's ability to: (a) Accept change readily, both in job responsibilities as well as in the work environment. (b) Maintain effectiveness when experiencing changes in work assignments, processes or conditions. (c) Seek to understand changes and approaches change positively. (d) Adjust behavior to deal effectively with changes in the work environment.</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Analytical Skills</td> <td></td> <td>Behavioral Factors</td> <td>Analytical Skills - refers to the employee's ability to: (a) Gather and analyze available information for use in demonstrating, testing and/or solving simple-to-complex concepts or problems. (b) Sift and sort through possible solutions to find those that best fit the current need.</td> </tr> </tbody> </table>	Select	Name	Domain	Competency Group	Description	<input type="checkbox"/>	Adaptability		Behavioral Factors	Adaptability - refers to the employee's ability to: (a) Accept change readily, both in job responsibilities as well as in the work environment. (b) Maintain effectiveness when experiencing changes in work assignments, processes or conditions. (c) Seek to understand changes and approaches change positively. (d) Adjust behavior to deal effectively with changes in the work environment.	<input type="checkbox"/>	Analytical Skills		Behavioral Factors	Analytical Skills - refers to the employee's ability to: (a) Gather and analyze available information for use in demonstrating, testing and/or solving simple-to-complex concepts or problems. (b) Sift and sort through possible solutions to find those that best fit the current need.
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Step	Action
	<ul style="list-style-type: none"><li>• The <b>Competency Detail</b> page displays.</li><li>• Select the number <b>3</b> box for the <b>Minimum Proficiency Level</b> (Meet Expectations).</li><li>• Click the <b>Save</b> button</li></ul> <div data-bbox="639 436 1122 705" style="border: 1px solid black; padding: 5px;"><p>Competency Detail: Attendance and Punctuality</p><p>Competency Name Attendance and Punctuality</p><p>Minimum Proficiency Level* <input type="radio"/> 1 <input type="radio"/> 2 <input checked="" type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5</p><p>Attachments</p><p>No items found</p><p><input type="button" value="Save"/> <input type="button" value="Back"/> <input type="button" value="Close"/></p></div> <ul style="list-style-type: none"><li>• The <b>Add Activity to Plan</b> confirmation message displays and the selected competency is added to the employee's plan.</li></ul>

**END OF PROCEDURE • RETURN TO TOP**